

INPUT®

**EUROPEAN
INDUSTRY DIRECTIONS
AND
FORECASTS**

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INPUT**



EUROPE/USA COMPARISON, 1984
(\$ Billions)

	GDP	INFORMATION SERVICES BUSINESS
United States	\$3,311	\$41.5
West Germany	573	2.4
France	444	3.5
United Kingdom	382	2.5
Italy	297	1.4



**LEADING EUROPEAN COMPANIES
INFORMATION SERVICES**

	\$ MILLIONS 1985
CAP GEMINI SOGETI	\$247
SCICON	202
CISI	171
GSI	139
SEMA-METRA	129
DATEV	122
THORN-EMI	117



MANUFACTURING PRODUCTIVITY 1988

	OUTPUT/ HOUR (\$)	ANNUAL GROWTH (Percent)
West Germany	\$20.22	2.5%
France	19.80	3.5
United States	18.21	1.2
Italy	17.72	3.1
Japan	17.61	3.9
United Kingdom	11.34	3.3



MOST SERIOUS DP PROBLEMS

	VERY SERIOUS (Percent)	FAIRLY SERIOUS (Percent)
Management Awareness	20%	30%
Staff Recruitment	15	30
Applications Backlog	10	35
Costs	5	55
Technological Change	-	50



MOST IMPORTANT DEVELOPMENTS

	VERY IMPORTANT (Percent)	UNIMPORTANT (Percent)
Development Centre	35%	20%
Departmental Software	30	10
M-M Links	30	10
Software Production Tools	25	10
UNIX Systems	10	30
Information Centre	10	25

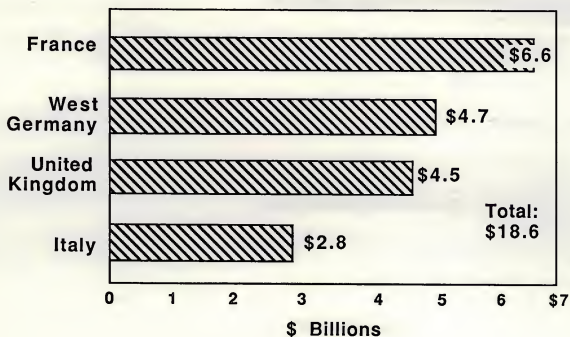


APPLICATION DEVELOPMENT PRIORITY

Factory Automation	65%
Accounting	65
Communications Network	55
Marketing/Sales	55
Office Automation	30
Data Base	20

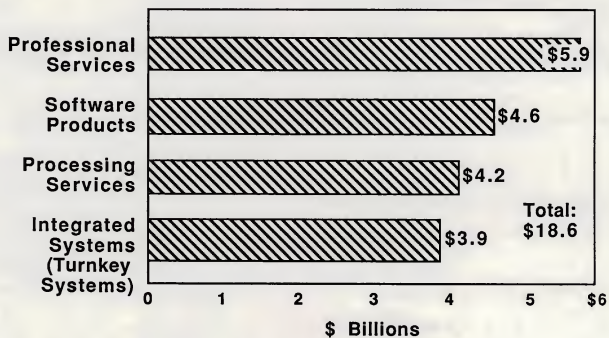


INFORMATION SERVICES 1986



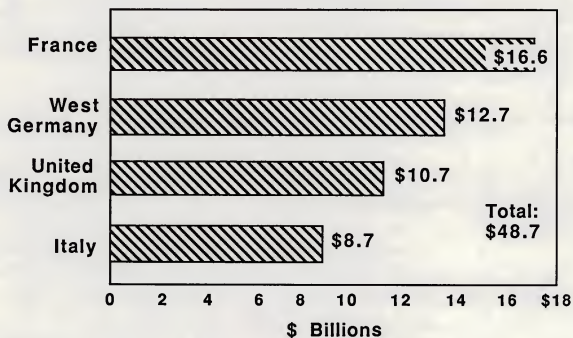


INFORMATION SERVICES 1986



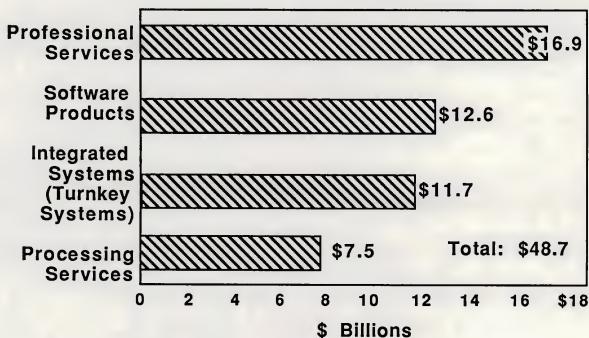


INFORMATION SERVICES 1991

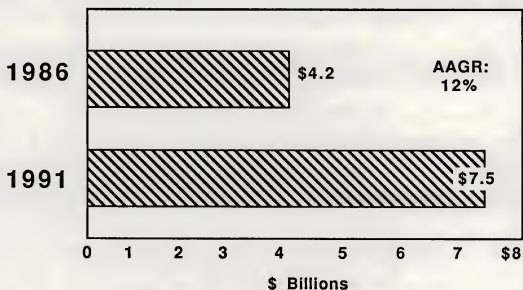




INFORMATION SERVICES 1991

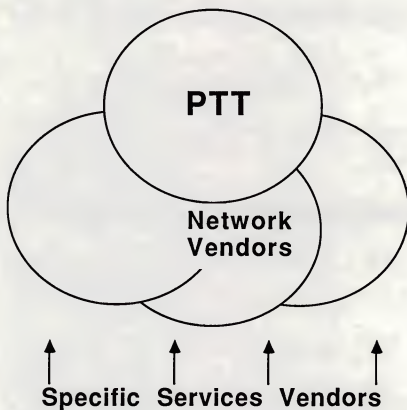


**PROCESSING SERVICES MARKET
Four Major European Countries**



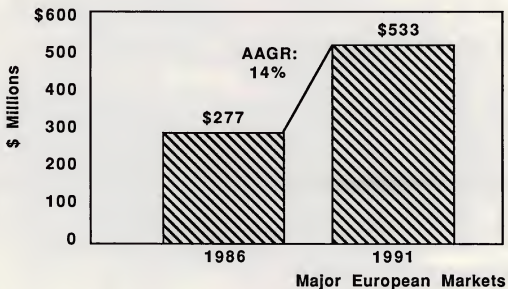


STRATEGIC DIRECTIONS





FACILITIES MANAGEMENT A REVITALIZED CONCEPT



FM - THE EUROPEAN PERSPECTIVE

- o France, Largest Market Today, Loses Out to United Kingdom by 1991**
 - o United Kingdom Growth 21% versus France's 10%**
 - o Italy Also Losing Market Share**
 - o West Germany Distrusts FM Concept**
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1871

1872

1873

1874

1875

1876

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1888

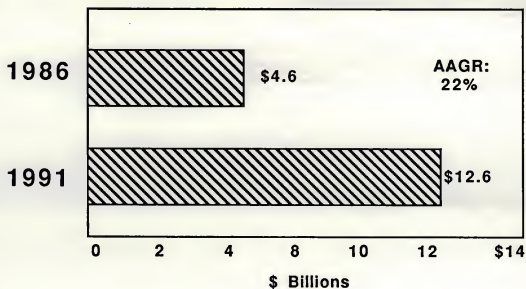
1889

1890

1891

1892

SOFTWARE PRODUCTS MARKET Four Major European Countries





US ATTITUDE TO AI

	POSITIVE (Percent)	INTEREST IN NEXT 4 YEARS (Percent)
United Kingdom	60%	15%
West Germany	50	10
France	10	30



**EXPERT SYSTEM APPLICATIONS
USER INTEREST**

	HIGH (Percent)	SOME (Percent)
Extension to DP Systems	60%	20%
Intelligent Office	50	20
Extension of Programming	40	40
Education and Training	40	35

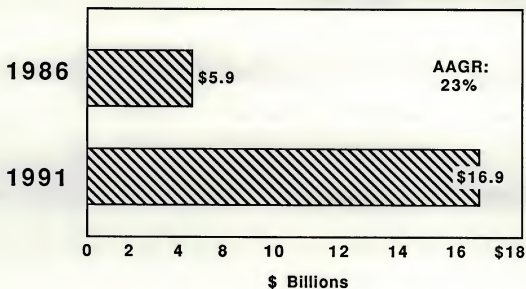


USER PRIORITIES FOR AI

Improved DP Function	30%
Disseminate Expertise	25
Management Support	20
Cost Reduction	15
Employee Productivity	10



**PROFESSIONAL SERVICES MARKET
Four Major European Countries**





**PROFESSIONAL SERVICES
DIRECTIONS**

- o Specialization**
 - o Marketing**
 - o Prime Contracting**
 - o Managing Technology**
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1870

1871

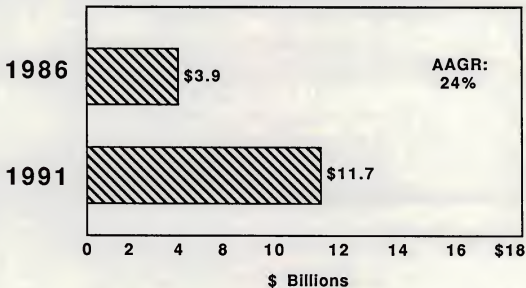
1872

1873

1874

1875

INTEGRATED SYSTEMS MARKET Four Major European Countries





STRATEGIC DIRECTIONS

- o Hardware Cost/Performance**
 - o Selling Costs versus Dealer Margins**
 - o Meeting Specialist Needs**
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